

TRAINING SERIES OVERVIEW



VolunteerCenter
Be the difference



In addition to the 2-hour Orientation, the Service Enterprise Training Series includes 4 sessions with approximately 16 hours of instruction and activities designed to help your organization begin its transformation into operating as a Service Enterprise.

Outreach Meeting

*May 19th at 9am in Salinas
May 25th at 9am in Monterey*

Objectives

At the end of this session, you will be able to:

- Build a collaborative, supportive cohort with other participating organizations
- Define Service Enterprise concepts, history and research
- Identify benefits of becoming a Service Enterprise

Agenda

- Welcome and Introductions
- What Is a Service Enterprise?
- Guiding Principles
- Service Enterprise Research
- *Small Group Activity: Case Study*
- Benefits of Service Enterprise
- *Small Group Activity*
- Program Model
- SEI History and Partners
- Closing

Who Should Attend

- Staff member(s) who will lead the Service Enterprise transformation
- Executive director
- Others who will participate in the training series – may include program staff, CFO, HR director, board members, others

Pre-work

- Read the case study on Downtown Women's Center
- Bring a copy of your org chart

Characteristics

- Introduction to the 10 Service Enterprise Characteristics





Session 1: Laying the Foundation

August 12 – 9am to 1pm

Objectives

At the end of this session, you will be able to:

- Apply leading practices for managing change
- Build senior leadership alignment, staff commitment and board support for the Service Enterprise transformation
- Reimagine how your organization can engage volunteers

Agenda

- Welcome
- Review: Video
- Change Management
- *Small Group Activity: Change Is Personal*
- Building Internal Support
- *Organizational Activity: Building Internal Support*
- Reimagining Engagement
- *Organizational Activity: Reimagining Engagement*
- Closing

Who Should Attend

- Staff member(s) who will lead the Service Enterprise transformation
- Executive director
- Program staff
- Optional: Board members, other staff as desired

Pre-work

- Re-read the case study on Downtown Women's Center
- Bring a copy of your organization's mission and vision statements

Characteristics

- Planning and Development
- Leadership Support





Session 2: Building Support

August 26 – 9am to 1pm

Objectives

At the end of this session, you will be able to:

- Create a culture of engagement
- Calculate your organization's return on volunteer investment (ROVI) for volunteer engagement
- Generate external support for the Service Enterprise transformation

Agenda

- Welcome
- Review: Video, Action Plan Template
- Fostering a Culture of Engagement
- Human Capital Strategies
- Establishing the Business Case: Return on Volunteer Investment
- A Look at Resources
- Building External Support
- *Organizational Activity*: Telling Your Service Enterprise Story
- Action Planning
- Closing

Who Should Attend

- Staff member(s) who will lead the Service Enterprise transformation
- Executive director
- Finance (CFO or other senior leader)
- Human resources (director or other senior leader)
- Program staff
- Optional: Board members, CFO, HR and development staff, other staff as desired

Pre-work

- Continue the process of reimagining how your organization works with volunteers; review ideas with stakeholders in the organization and fine tune the vision
- Re-read the case study for Downtown Women's Center
- Bring a copy of your SED results and your org chart

Characteristics

- Planning and Development
- Leadership Support
- Resource Allocation
- Tracking and Evaluation
- Funding
- Partnering to Extend Reach





Session 3: Creating Sustainability

September 9 – 9am to 1pm

Objectives

At the end of this session, you will be able to:

- Identify assets in your organizations
- Outline roles volunteers currently fill
- Identify roles volunteers potentially could fill in your organization
- Apply leading practices for engaging skills-based volunteers

Agenda

- Welcome
- Review: Video
- Understanding Your Assets
- *Organizational Activity:* Understanding Your Service Enterprise Assets
- Current Volunteer Practices and Processes
- *Organizational Activity:* Process Analysis
- Engaging Skills-based Volunteers
- *Activity:* SBV Round Robin
- Action Planning
- Closing

Who Should Attend

- Staff member(s) who will lead the Service Enterprise transformation
- Executive director
- Program staff
- Optional: Board members, HR and development staff, other staff as desired

Pre-work

- Fill in action plan items from sessions 1 and 2
- Complete the ROVI take home activity
Bring a copy of your SED results, action plan and job descriptions

Characteristics

- Planning and Development
- Onboarding and Supervision





Session 4: Moving to Success

September 30 – 9am to 1pm

Objectives

At the end of this session, you will be able to:

- Identify methods for incorporating changes in the culture and evaluating progress of the transformation
- Compare action plans against your SED results and fill in your action plans to address identified gaps
- Determine next steps for training, support and certification

Agenda

- Welcome
- Review: Video
- Incorporating Changes into the Culture
- Evaluating Your Progress
- *Organizational Activity: Moving to Success*
- Next Steps
- Q&A
- Organizational Presentations
- Closing

For the final session, your team will prepare a 10-minute presentation to share your Service Enterprise story. Prepare your presentation for a particular audience, such as a funder, board or staff/long-term volunteers. Your presentation should:

- Sell the vision to your audience. How do you re-imagine working with volunteers?
 - *Use your action plan.*
- Talk about current challenges and new wins. How do you plan to sustain the work and keep the process moving forward? What do you need to be successful?
 - *Use Kotter's change management steps and the Service Enterprise characteristics.*
- Lead with stories; back up with data. How will you build Service Enterprise into your organizational story?
 - *Use your SED results.*
- Make the case for support. What do you want from this particular group?
 - *Examples may include support, time, dollars, skills-based or pro bono service, etc.*

Who Should Attend

- Staff member(s) who will lead the Service Enterprise transformation
- Executive director
- Program staff
- Optional: Board members, HR and development staff, other staff as desired

Pre-work

- Fill in action plan items related to topics covered in the previous training sessions
- Bring SED results and action plan
- Prepare presentation according to provided guidelines

Characteristics

- Leadership Support
- Tracking and Evaluation
- Partnering to Extend Reach

